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Study to ascertain availability, contents, and importance of annual report as document of institutional operation in 122 American institutions of higher education; classified according to geographic location, control, student body, and enrollment. Recommendations include desirability of further study of contents of annual report, with special reference to major topics and materials to be included.

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Dr Haswell

From SH

A STUDY OF THE ANNUAL REPORT IN AMERICAN HIGHER EDUCATION

BY

Adolf Studier

SEMINAR IN HIGHER EDUCATION

U. S. DEPARTMENT OF HEALTH, EDUCATION AND WELFARE
Office of Education

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DEPARTMENT OF EDUCATION

THE CATHOLIC UNIVERSITY OF AMERICA

WASHINGTON 17, D.C.

JANUARY 1960.

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INTRODUCTION

Reason for the study

The present study was undertaken by the Seminar in Higher Education under the direction of Dr. George F. Donovan to ascertain the availability, contents, and importance of the annual report as a document of institutional operation in a selected number of American institutions of higher learning.

Definition of Term

The term, annual report, generally applies to a yearly document prepared by and under the direction of the college and university president, covering activities, problems and proposals of the past twelve-month period, and submitted by him to the board of trustees. In some instances a separate financial report is filed.

Importance of the report

1. The report constitutes a record of the institution's activity in a given period of time.
2. It is an instrument of communication between the president, trustees, other officers of administration, the faculty, and other groups.
3. As a source of information for historical studies the report is an invaluable aid.
4. The institution's leadership may be analyzed through the recommendations, achievements, and problems identified in the report.

Procedure

The Seminar prepared and sent a form letter to the institutions of their choice requesting a copy of the annual report. Appendaged was a questionnaire seeking information on the number of copies printed, and to whom the copies were sent. Each student selected thirty institutions to be contacted. Chart No. I, Availability of Annual Reports in Selected American Institutions of Higher Learning, identifies the number and percentage of responses, type of control, and student body according to geographical location. The contents of the annual report are listed in Chart No. II, and conclusions and recommendations are offered.

In December, 1959, and January, 1960, each member gave a report on his findings. The Seminar, working as a committee, discussed the best manner in which these findings could be coordinated into a consolidated report. The present work is the result of these discussions.

Seminar members in the First Semester, 1959-60 were: Delia Carrigan, Edward DiBella, Daniel Pompa, Pauline Scanlan, Reverend David Shaum, and Sister M. Assunta, O.S.B.

CHART No. 1

AVAILABILITY OF ANNUAL REPORTS IN SELECTED AMERICAN

INSTITUTIONS OF HIGHER LEARNING

	LOCATION OF INSTITUTIONS														
STATES	ALABAMA	ARKANSAS	CALIFORNIA	DISTRICT OF COLUMBIA	ILLINOIS	INDIANA	MARYLAND	MASSACHUSETTS	MICHIGAN	MISSISSIPPI	NEW JERSEY	PENNSYLVANIA	VIRGINIA	WISCONSIN	TOTAL
INSTITUTIONS CONTACTED	16	13	30	13	6	10	15	22	10	10	10	15	18	5	193
RESPONDED	10	6	24	7	4	8	9	12	5	4	5	12	11	5	122
REPORT RECEIVED	7	3	10	2	2	3	3	9	2	-	5	7	6	3	62
RESPONSE PERCENTAGE	62	46	80	54	67	80	60	54	50	40	50	80	61	100	63
RESPONDING INSTITUTIONS															
CONTROL OF INSTITUTION:															
PUBLIC	5	3	10	1	1	2	4	1	1	2	-	1	5	1	37
PRIVATE	2	-	9	6	1	-	5	9	-	-	1	7	6	2	48
CHURCH RELATED	3	3	5	-	2	6	-	2	4	2	4	4	-	2	37
STUDENT BODY:															
COEDUCATIONAL	8	6	19	5	3	4	7	5	3	4	1	10	6	5	86
COORDINATE	-	-	-	-	-	-	-	-	-	-	2	-	-	-	2
MEN	1	-	3	1	-	2	1	3	-	-	1	2	3	-	17
WOMEN	1	-	2	1	1	2	1	4	2	-	1	-	2	-	17
ENROLLMENT:															
200 OR LESS STUDENTS	-	-	-	2	-	-	-	-	-	-	-	1	-	-	3
201-500 STUDENTS	2	2	6	2	-	-	4	1	-	2	1	2	4	-	26
501-1,000 STUDENTS	2	2	5	-	-	2	-	-	2	1	-	1	3	2	20
1001-2000 STUDENTS	3	1	5	-	2	2	2	7	1	-	2	3	2	1	31
2001- OR MORE STUDENTS	3	1	8	3	2	4	3	4	2	1	2	5	1	2	41

CHART NO. 11

MAJOR CONTENTS OF THE ANNUAL REPORT INCLUDED

1) TABLE OF CONTENTS PAGE
2) LE ER OF TRANSMITTAL
3) FINANCIAL STATEMENT
4) FACULTY
5) RESEARCH
6) BUILDING PROJECTS COMPLETED AND/OR PROJECTED
7) STUDENT LIFE
8) PICTURES, GRAPHS AND CHARTS
9) ALUMNI
10) PROBLEM AREAS AND FUTURE PLANS

CONCLUSIONS

1) The Annual Report varies in format, especially size, attractiveness and type of printing.

2) A substantial minority of institutions issue no Annual Report.

3) Public distribution is not a general practice.

4) Numerical distribution varies from 1 to 30,000 copies.

5) Contents do not follow any common practice.

6) A representative number of presidents of institutions having no Annual Report manifested an interest in the Report as a document of institutional development.

7) Often items in financial reports are not adequately identified.

8) There is evidence of great variety in the techniques employed in the collecting and assembling of the data for the annual report.

RECOMMENDATIONS

1) There should be an Annual Report as a document of institutional government.

2) A study be made of the contents of the Annual Report with special reference to the major topics and related materials to be included.

3) Attention should be given to the format-simple but attractive. The attractive Report is in itself a reflection of the work that is being done at the institution.

4) Because of cost involved in the preparation, printing and distribution, Reports should be designed to reach the proper clientele concerned. Two reports are suggested: a detailed and lengthy one for those whose concern it is to examine more minutely the work of the institution; and another, brief, yet complete, Report to be sent to all who are interested or may become interested in the institution.

5) The very diversity of information and opinion found in the Annual Report plus the document's general unavailability suggests a study of the factors behind these characteristics.

Additional copies of this study may be obtained by contacting

Office of Higher Education - Department of Education
The Catholic University of America - Washington 17, D.C.
Telephone Adams 6-2000, Ext. 262, 240.